

A P R E S E N T A T I O N B Y E S O

PM Training Changes in June 23, 2021 Release

eso

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New Training Design

- There is a permanent header for the class which shows the class status.
- The ellipsis menus are now called Actions.
- Sessions now can have attendees, credits, credentials, and skills associated with them and the dates granted are based on the date of the session.

The screenshot displays the ESO Personnel Management web application. The browser address bar shows the URL: `stage.esosuite.net/personnel/training/class/c54b324d-2536-4cd8-adbe-ad4b0115f998`. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area features a class header for "Hazmat Awareness and Operations" with a status of "Open" and a "Complete this class" button. Below the header is a "Class details" section with an "Edit" button and a list of fields: Class Name, Class Description, Class Objective, Class Number, Class Type (Internal), Category, Method, Educational Facility, Accreditation Code, and Origin (Training). A "Manage Attendees" link is also visible in the sidebar.

Session Name and Absence Reason Lists

- Add values to the Session Name list and Absence Reason list from Settings.
- Users with the Class List security privilege in one of their roles in Admin can see the lists in Settings and enter values.

The image displays two screenshots of the Personnel Management web application interface. The top screenshot shows the 'Absence Reasons' settings page, which includes a list of absence reasons such as 'Absent (excused)', 'Absent (not excused)', 'Medical (excused)', and 'Medical (not excused)'. The bottom screenshot shows the 'Session Names' settings page, which includes a list of session names such as 'Shift A', 'Shift B', 'Shift C', 'Session 1', 'Session 2', and 'Session 3'. A red circle highlights the 'Settings' menu item in the left sidebar of the bottom screenshot.

Single Session Class

- All classes must have at least one session to add attendees, credits, credentials, or skills.
- If a class only has one session, all of the information is on the “About this class” tab.
- For existing open classes that have attendees but no session, the attendees will be added to the session when it is added.

The screenshot displays the ESO Personnel Management interface. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows the 'About this class' tab for a class titled 'Hazmat Awareness and Operations' with a start date of 06/07/2021 at 09:00. A notification banner at the top indicates the class is 'Open' and that information is not reflected on the attendee's record until completion. Below the notification, there are buttons for 'Complete this class', 'Open sign in sheet', and 'Copy sign in sheet'. The 'About this class' section includes a 'Session' table with 'Add', 'Edit', and 'Delete' buttons. The table lists session details such as Session Name (Shift A), Session Description (For all Shift A crew members), Required (No), Date of this session (06/07/2021), Start Time (09:00), End Time (11:00), Instructors (Allison, John E Bell, Sam), Training Location (Veazie Fire Department), and Street addresses (1084 Main St and Veazie Town Offices).

Session		Add	Edit	Delete
Session Name	Shift A			
Session Description	For all Shift A crew members			
Required	No			
Session Objective				
Date of this session	06/07/2021			
Start Time	09:00			
End Time	11:00			
Instructors	Allison, John E Bell, Sam			
Training Location	Veazie Fire Department			
Street address 1	1084 Main St			
Street address 2	Veazie Town Offices			

Multiple Session Class

- When a second session is added, the Sessions tab becomes available.
- The Actions menu has Edit, Delete, and Manage Attendees options for each session.
- Clicking on the session row will open the session's detail view.

The screenshot displays the ESO Personnel Management interface. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows a class detail view for 'Hazmat Awareness and Operations' starting on 06/07/2021 at 09:00. A 'Sessions' tab is active, showing a table of sessions. The table has columns for Session name, Date, Time, and Attendees added. Two sessions are listed: 'For all Shift A crew members' on 06/07/2021 from 09:00 - 11:00 with 6 attendees, and 'For all Shift B crew members' on 06/15/2021 from 09:00 - 11:00 with 0 attendees. Each row has an 'Actions' button. A blue 'Add another session' button is located at the top right of the sessions table. Above the table, there is a 'Complete this class' button and a 'Session' dropdown menu set to 'For all Shift ...' with 'Open sign in sheet' and 'Copy sign in sheet' buttons.

Session name	Date	Time	Attendees added	Actions
For all Shift A crew members	06/07/2021	09:00 - 11:00	6	Actions
For all Shift B crew members	06/15/2021	09:00 - 11:00	0	Actions

Session Name

- The current Session Name text field is relabeled Session Description. All current information will remain in that field.
- When a Session Name is selected from the list, the other values defined in the list, such as Session Description and Session Objective, will also be populated as default values.
- Any of the default values can be updated in that session record.

The screenshot displays the ESO Personnel Management web application. The main content area shows a class record for 'Hazmat Awareness and Operations'. A 'New Session' modal is open on the right side of the screen. The modal contains the following fields:

- Session Name**: A text input field with a red warning icon and the text 'Required'.
- Session Description**: A text input field with a red warning icon and the text 'Required'.
- Required**: A checkbox with the label 'Required'.
- Session Objective**: A large text area.
- Date**: A date input field with a red warning icon and the text 'Required', followed by a calendar icon.
- Start Time**: A time input field with a red warning icon and the text 'Required'.
- End Time**: A time input field with a red warning icon and the text 'Required'.
- Instructors**: A list input field with a menu icon.
- Training Location**: A list input field with a menu icon.

The background interface shows a sidebar with 'Personnel', 'Training', and 'Group Actions' options. The main content area includes a 'Class' section for 'Hazmat Awareness and Operations' with a 'Complete this class' button, and a 'Session' section with 'No sessions' listed. Other sections include 'Credits awarded', 'Credentials granted', and 'Skills granted'.

Session Detail

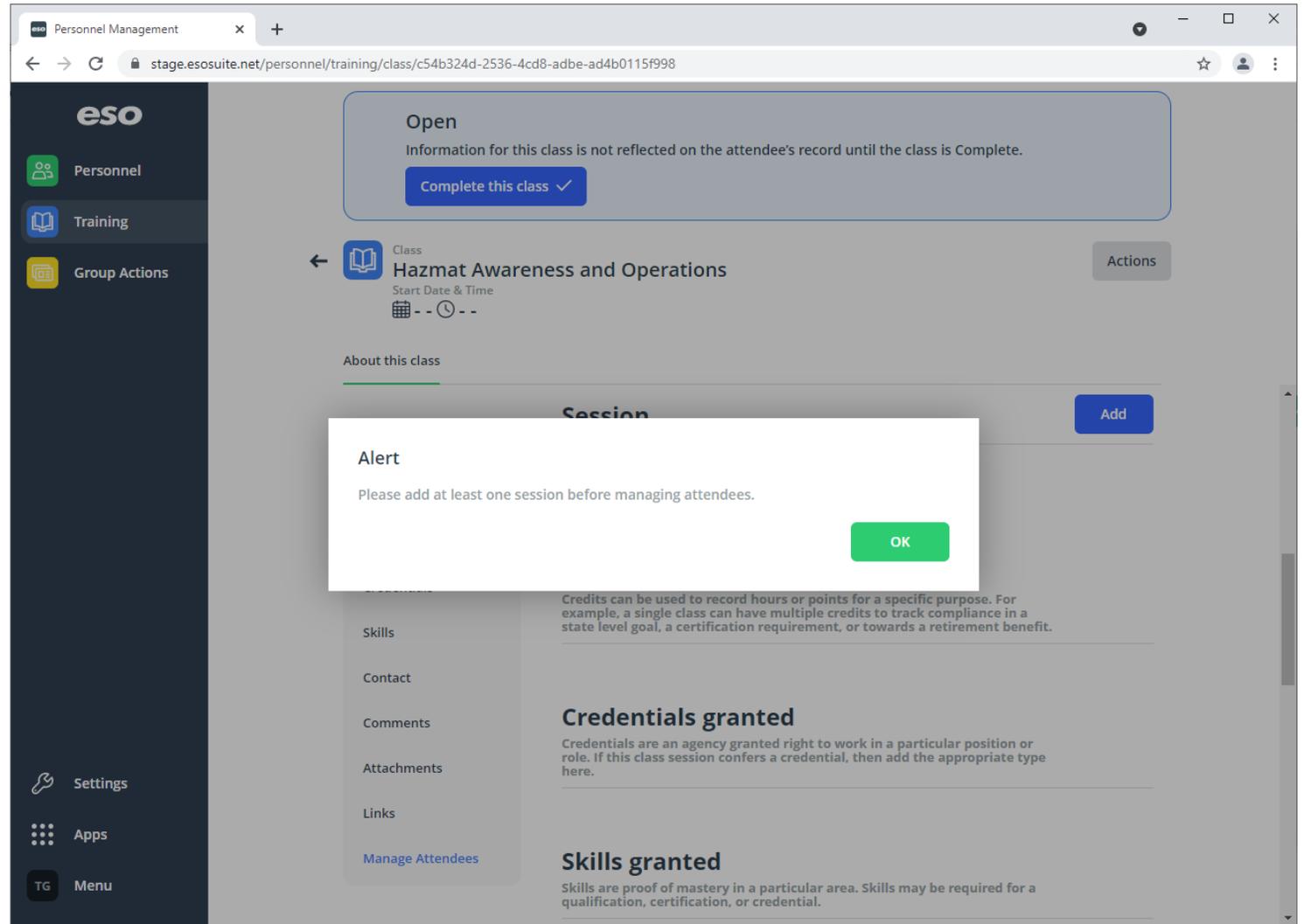
- Single session classes have the session detail displayed in the “About this class” tab.
- Multi-session classes have a separate window to display the session detail which includes the credits, credentials, and skills.
- The new Session Objective and Required indicator allow more detailed information on a Session.

The screenshot displays the ESO Personnel Management interface. On the left is a dark sidebar with navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows a class titled 'Hazmat Awareness and Operations' with a start date of 06/07/2021 at 09:00. A red arrow points from the 'About this class' tab in the sidebar to the 'About this class' tab in the main content area. The 'About this class' tab is active, showing session details for 'Shift A - For all Shift A crew members'. A 'Details' sidebar on the left of the main content area lists options: Details, Credits, Credentials, Skills, and Manage Attendees. The 'Details' section on the right includes an 'Edit' button and a table of session information.

Details	
Session Name	Shift A
Session Description	For all Shift A crew members
Required	No
Session Objective	
Date of this session	06/07/2021
Start Time	09:00
End Time	11:00
Instructors	Allison, John E Bell, Sam
Training Location	Veazie Fire Department

Attendees

- Attendees are now associated with a session. This allows partial credit for a class or to have a person go to certain sessions of a class.
- For existing completed classes, the attendees have been added to all sessions.
- For existing open classes that have attendees but no session, the attendees will be added to the session when it is added.



Access to Manage Attendees

- Use the “Manage Attendees” link to add and remove attendees, and record attendance, pass/fail, grades, and absence reason.
- The link is available in the “About this class” tab for single session classes, in the Actions menu in the session list, and in the session detail for multi-session classes.

The screenshot displays the ESO Personnel Management interface. On the left is a dark sidebar with navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows a class titled "Hazmat Awareness and Operations" with a start date of 06/07/2021 at 09:00. Below the class header is a tabbed interface with "About this class" selected. A vertical menu on the left of the "About this class" section lists various options, with "Manage Attendees" at the bottom circled in red. To the right of this menu is a "Class details" form with fields for Class Name, Class Description, Class Objective, Class Number, Class Type (set to Internal), Category, Method, Educational Facility, and Accreditation Code. An "Edit" button is located at the top right of the class details section. At the top of the page, there is an "Open" notification box with buttons for "Open sign in sheet", "Copy sign in sheet", and "Complete this class".

Manage Attendees

- There is a new Attended field which is required.
- Pass/Fail is available but is no longer required and now has an N/A option.
- There is a new Credit indicator to make it easy to know if the person will be granted the associated credits, credentials, and skills when the class is set to Completed.
 - If a person has Attended and Pass/Fail is N/A or Pass, then the person will be granted the credits.
 - If a person has Attended and Pass/Fail is Fail, then the person will not be granted the credits.
 - If a person has not Attended, then the person will not be granted the credits.
 - Note: For existing completed classes all attendees have been set to Attended.

The screenshot shows a web browser window with the URL `stage.esosuite.net/personnel/training/class/c54b324d-2536-4cd8-adbe-ad4b0115f998/attendees`. The interface features a dark sidebar with navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area displays a class titled "Hazmat Awareness and Operations" starting on 06/07/2021 at 09:00. A notification box at the top indicates that information is not reflected until the class is complete, with buttons for "Open sign in sheet", "Copy sign in sheet", and "Complete this class". Below this, there is a section for "Shift A session attendees (6)" with a search filter and an "Add an attendee" button. A "Making changes?" banner includes a "Save all attendee changes" button and a timestamp "Last updated 2 hours ago". A table lists the attendees with columns for Name, Did they attend?, Pass/Fail, Grade, Credit?, and Actions.

Name	Did they attend?	Pass/Fail	Grade	Credit?	Actions
Coberman, Andrew L	No	N/A	0-100	No	Remove
Cheeseman, Carter	No	Medical (excu...	0-100	No	Remove
Burton, Moira A	Yes	Pass	0-100	Yes	Remove
BRADLEY, CONNOR	Yes	Fail	0-100	No	Remove
Badden, Jack	No	N/A	0-100	No	Remove
Alomar, Sheva	Yes	N/A	0-100	Yes	Remove

Manage Attendees (continued)

- All attendees for the session can be set to Attended and to Pass using the options in the Session Action menu.
- If the person is set to No for attended, there is an Absence Reason field now available to record why the person was absent. That list is available in Personnel > Settings > Absence Reasons.
- If the person has signed in using the digital sign-in sheet, then there is a “View signature” link, which will open the attachment view to display the signature. The name of the signature file is the attendee’s name with the date and time when they signed.
- When attendees have been added or changed, click the “Save all attendee changes” button to save the changes. If there are unsaved changes, the button is blue.

[< Back to Class Details](#)

Shift A session attendees (6)

For all Shift A crew members

[Add an attendee +](#)

Making changes? [Save all attendee changes](#) Last updated 2 hours ago

Name	Did they attend?	Pass/Fail	Grade	Credit?	Actions
Coberman, Andrew L	<input type="radio"/> No	N/A	0-100	No	Remove
Cheeseman, Carter	<input type="radio"/> No Medical (excu... ≡	N/A ≡	0-100	No	Remove
Burton, Moira A	<input checked="" type="radio"/> Yes	Pass ≡	0-100	Yes	Remove
BRADLEY, CONNOR	<input checked="" type="radio"/> Yes	Fail ≡	0-100	No	Remove
Badden, Jack	<input type="radio"/> No	N/A ≡	0-100	No	Remove
Alomar, Sheva	<input checked="" type="radio"/> Yes View signature	N/A ≡	0-100	Yes	Remove

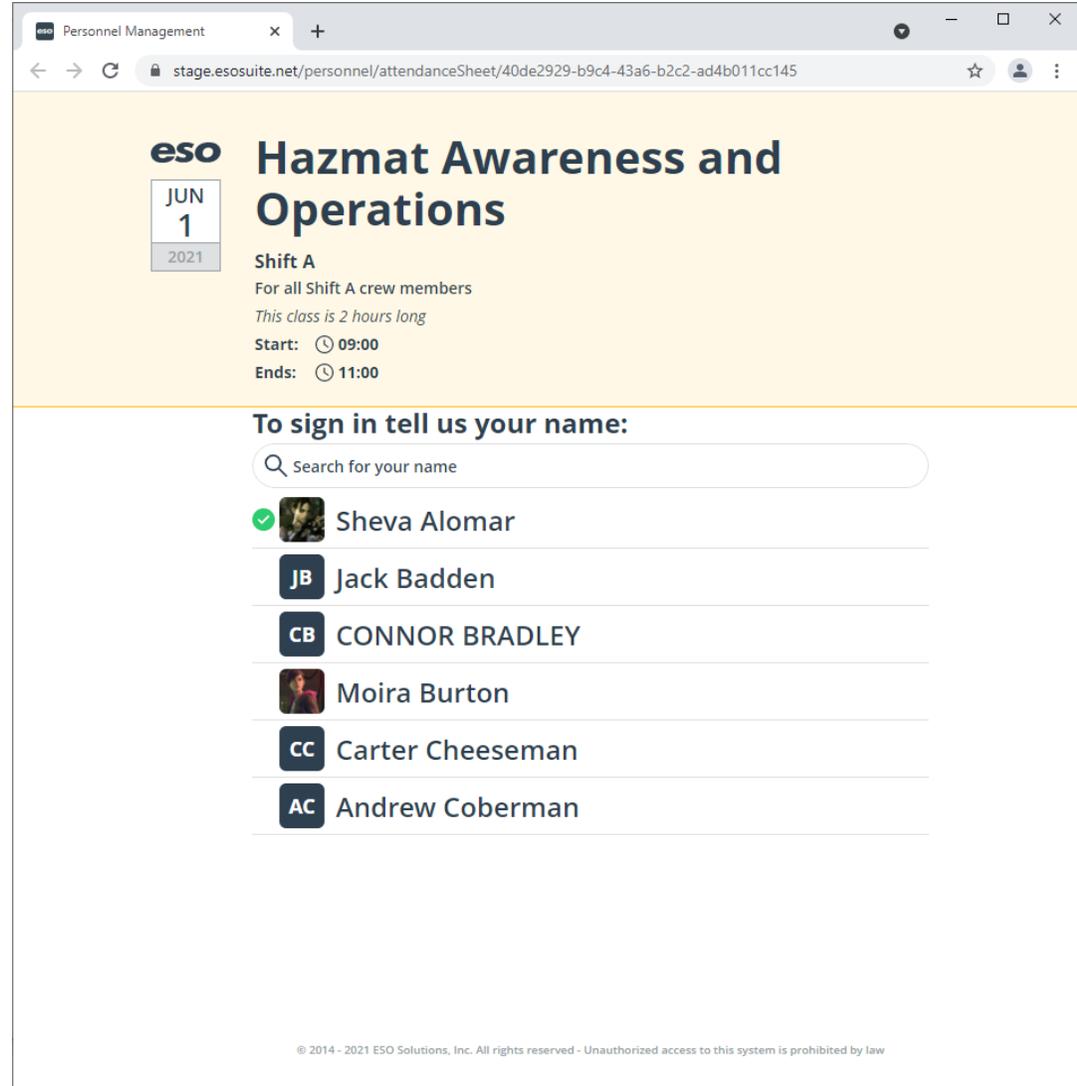
Adding Credits, Credentials, and Skills

- Credits, credentials, and skills are now associated with a session.
- For existing completed classes, the credits, credentials, and skills have been added to the latest session.
- For existing open classes that have credits, credentials, and/or skills, they will be added to the latest session. If the class does not have any sessions, they will be added to the session when it is created.
- The functionality for adding credits, credentials, and skills is the same but now the date issued can be set for the attendees in a session instead of all of the attendees in the class.

The screenshot displays the ESO Personnel Management web application. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows the details for a class named 'Hazmat Awareness and Operations', which started on 06/07/2021 at 09:00. The interface includes a top navigation bar with 'Open' status and buttons for 'Open sign in sheet' and 'Copy sign in sheet'. Below the class title, there are tabs for 'About this class' and 'Sessions'. The 'Sessions' tab is active, showing three sections: 'Credits awarded', 'Credentials granted', and 'Skills granted'. Each section has an 'Add' button and a description of the respective feature. The 'Credits awarded' section notes that credits can be used for recording hours or points. The 'Credentials granted' section explains that credentials are agency-granted rights. The 'Skills granted' section states that skills are proof of mastery. The bottom of the page shows the ESO logo.

Digital Sign-in Sheet

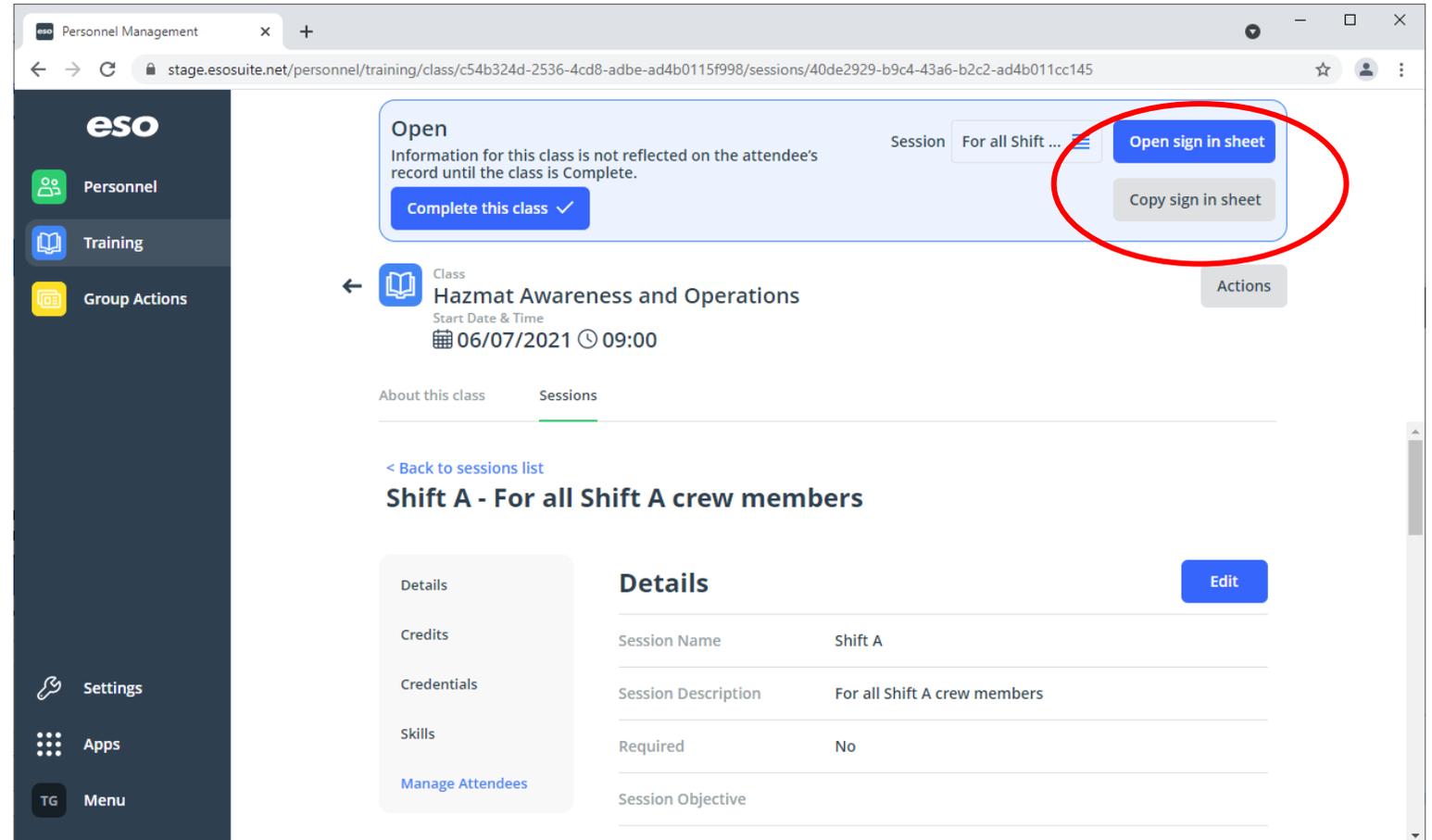
- There is now a digital sign-in sheet that is intended to be used with a tablet or phone to allow an attendee to enter a signature, indicating that they attended the session.
- The sign-in sheet is only available on Open classes.
- Class and session detail information is available at the top of the screen.



The screenshot shows a web browser window with the URL `stage.esosuite.net/personnel/attendanceSheet/40de2929-b9c4-43a6-b2c2-ad4b011cc145`. The page header includes the ESO logo and the title "Hazmat Awareness and Operations". A calendar widget shows "JUN 1 2021". Below the title, it specifies "Shift A" for all Shift A crew members, with a duration of 2 hours. The start time is 09:00 and the end time is 11:00. A search bar is labeled "To sign in tell us your name:". Below the search bar, a list of names is displayed, each with a small profile picture icon: Sheva Alomar (with a green checkmark), Jack Badden (JB), CONNOR BRADLEY (CB), Moira Burton, Carter Cheeseman (CC), and Andrew Coberman (AC). At the bottom of the page, there is a copyright notice: "© 2014 - 2021 ESO Solutions, Inc. All rights reserved - Unauthorized access to this system is prohibited by law".

Security for Digital Sign-in Sheet

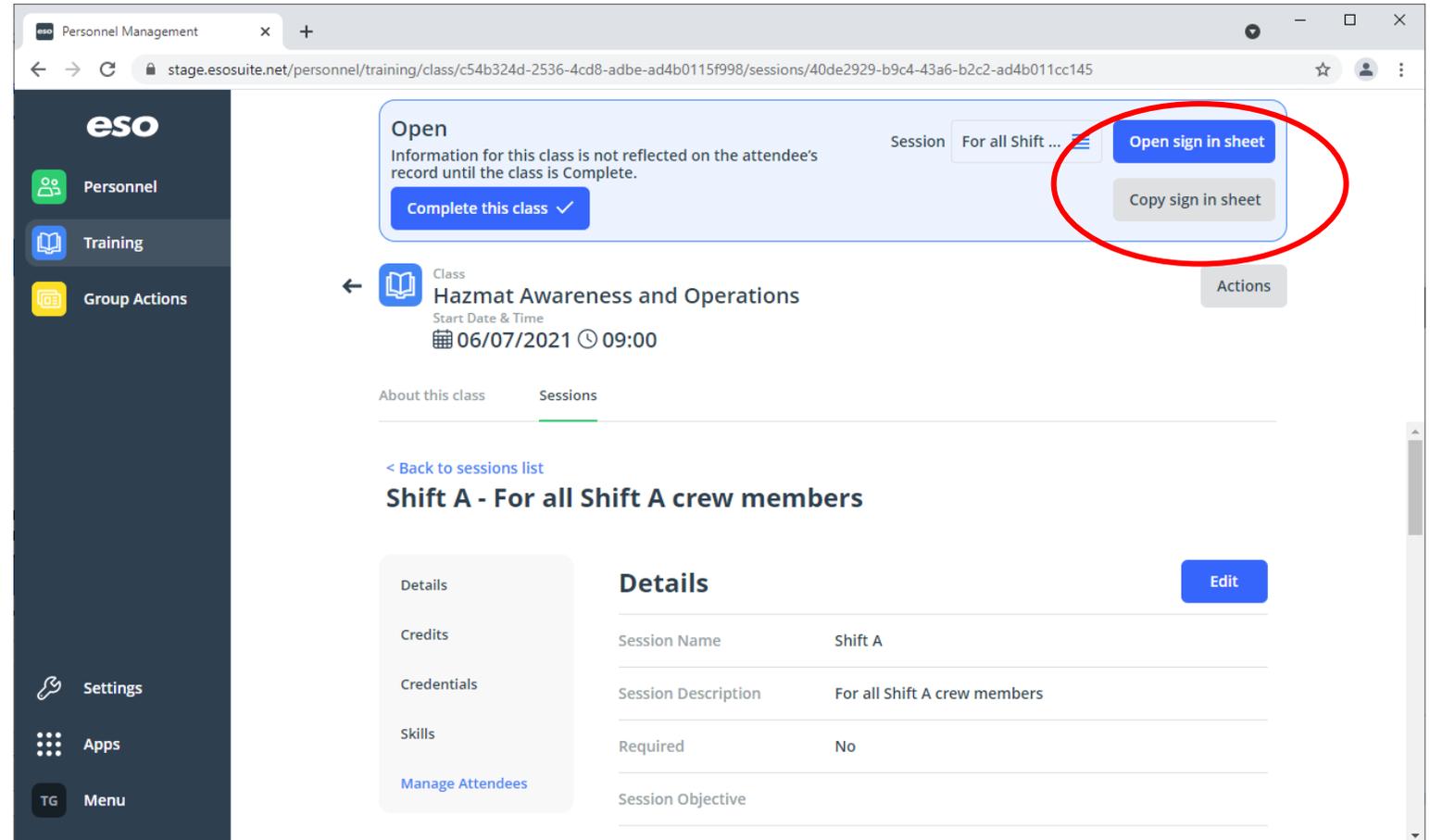
- There is a new security permission called “Sign in Sheet Access” that is required to use the Sign in Sheet functionality.
 - This has been added to the PM Training Manager, PM Training Supervisor, and Personnel Management Admin roles.
 - It may be added to other roles as needed in Admin > Security > Roles.
- Instructors will need to have an ESO login and the “Sign in Sheet Access” security permission to open the sign in sheet. Instructors do not need to have any PM or Training security roles.



The screenshot displays the ESO Personnel Management web application. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows a class session for 'Hazmat Awareness and Operations' on 06/07/2021 at 09:00. A notification banner at the top states 'Information for this class is not reflected on the attendee's record until the class is Complete.' Below this, there are two buttons: 'Open sign in sheet' and 'Copy sign in sheet', both of which are circled in red. The 'Open sign in sheet' button is highlighted with a blue background. Below the notification, there is a 'Complete this class' button with a checkmark. The page also shows a 'Class' section with the title 'Hazmat Awareness and Operations' and a start date/time of '06/07/2021 09:00'. A 'Sessions' tab is active, showing a session titled 'Shift A - For all Shift A crew members'. A 'Details' section is visible with an 'Edit' button. The 'Details' section includes fields for Session Name (Shift A), Session Description (For all Shift A crew members), Required (No), and Session Objective.

Accessing the Digital Sign-in Sheet

- Clicking “Open sign in sheet” will open it in a new browser tab.
- Clicking “Copy sign in sheet” will copy the URL to the clipboard so that it can be provided to an instructor via email, text, or messaging.
- For a multi-session class, a session must be selected in the header first so that the appropriate sign in sheet is selected.



The screenshot displays the ESO Personnel Management web application. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area shows a class titled "Hazmat Awareness and Operations" with a start date of 06/07/2021 at 09:00. A session is selected, and the header indicates "Shift A - For all Shift A crew members". A blue button labeled "Open sign in sheet" is circled in red, and a grey button labeled "Copy sign in sheet" is visible below it. The "Open sign in sheet" button is highlighted with a red circle.

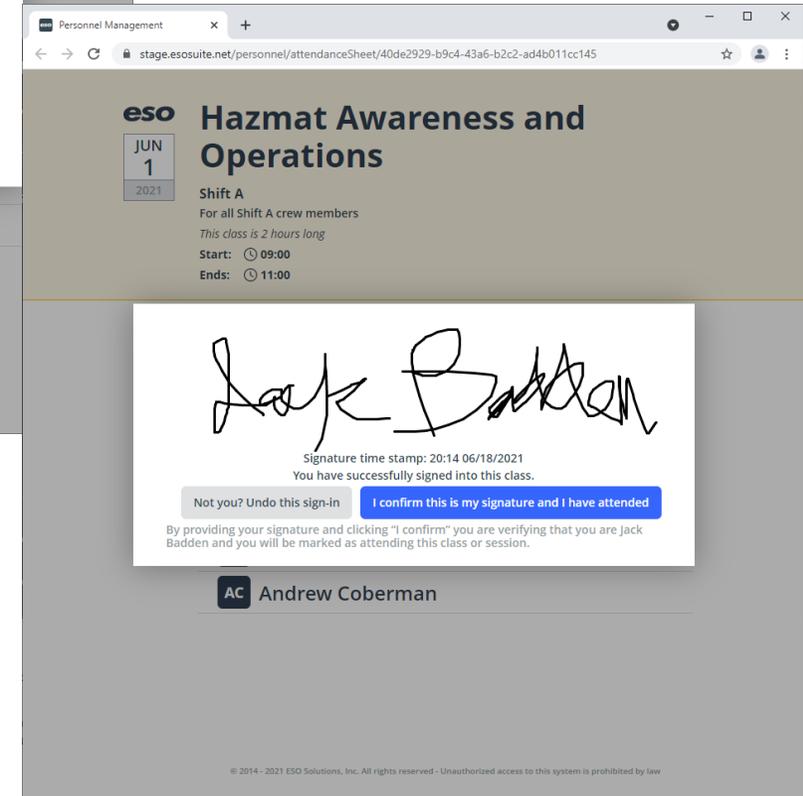
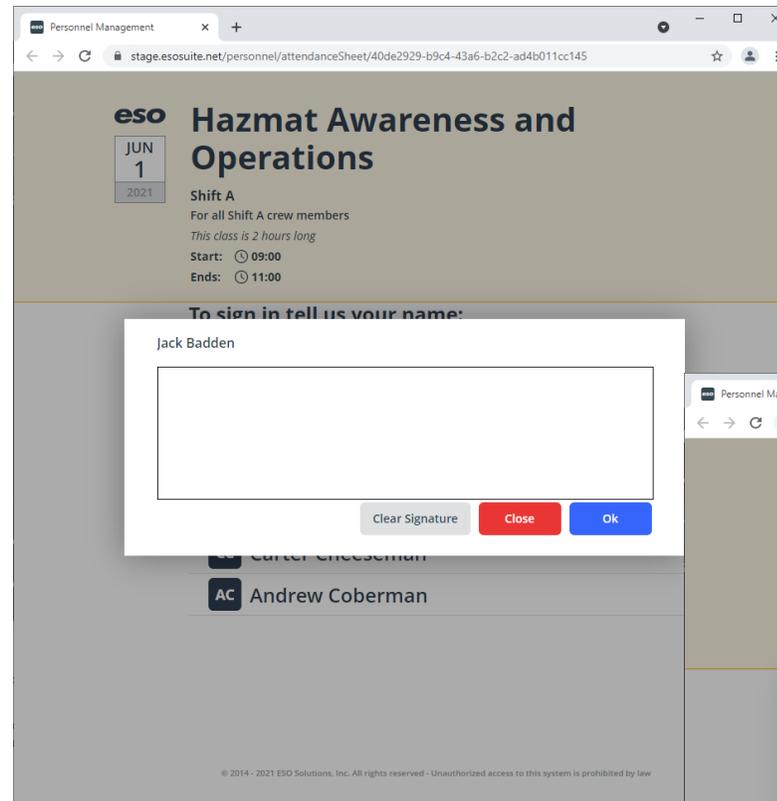
Using the Digital Sign-in Sheet

- All attendees for the session will be available in the sign in sheet.
- If an attendee is added to the session in PM, they will automatically appear on the sign in sheet.
- Searching will filter the list.
- An attendee who has signed is easily identified by a green check.

The screenshot shows a web browser window titled "Personnel Management" with the URL "stage.esosuite.net/personnel/attendanceSheet/40de2929-b9c4-43a6-b2c2-ad4b011cc145". The page header features the ESO logo and the session title "Hazmat Awareness and Operations". A calendar widget shows "JUN 1 2021". Below this, it specifies "Shift A" for all Shift A crew members, with a 2-hour duration, starting at 09:00 and ending at 11:00. A search bar prompts users to "To sign in tell us your name:". A list of attendees is shown, with "Sheva Alomar" marked with a green checkmark, indicating she has signed in. Other attendees listed are Jack Badden, CONNOR BRADLEY, Moira Burton, Carter Cheeseman, and Andrew Coberman. A footer contains the copyright notice: "© 2014 - 2021 ESO Solutions, Inc. All rights reserved - Unauthorized access to this system is prohibited by law".

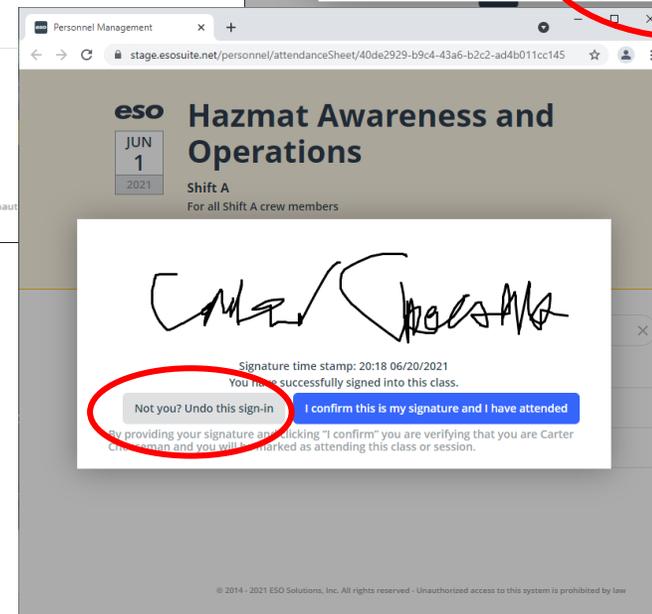
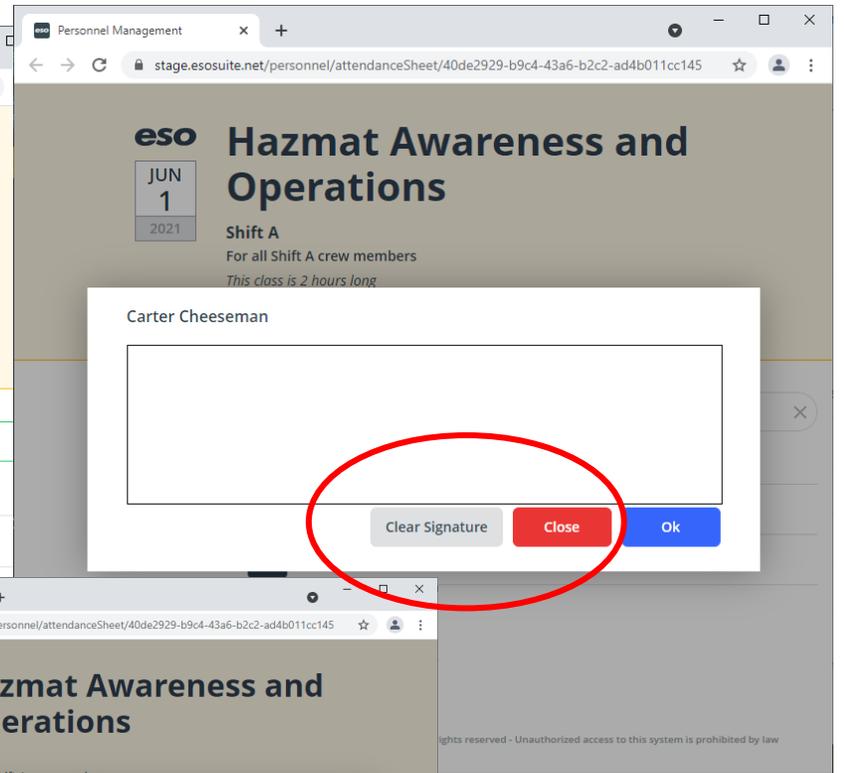
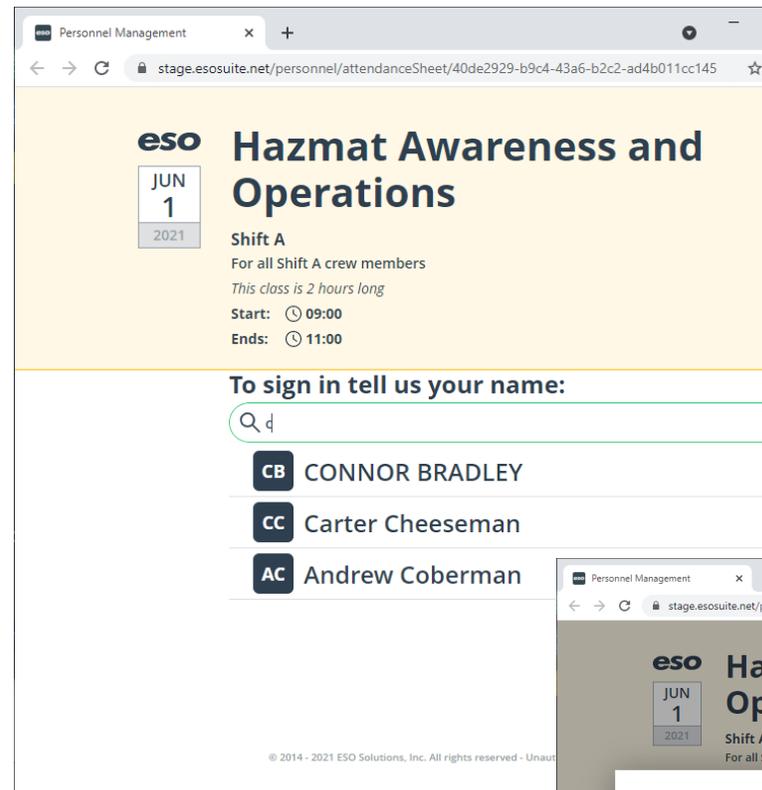
Capturing signatures

- When a name is selected, the signature box opens.
- If satisfied with the signature, click OK.
- The signature and sign in confirmation appears.
- If confirmed, the person is set to “Attended” in the Manage Attendees list for the session in PM and the signature is available to view from there.
- Signatures are captured with the person’s name, and date and time stamp.



Managing Sign-in

- After the instructor logs in, the attendees can find themselves and sign on the device.
- After the signature is confirmed, the search will reset.
- If the attendee has accidentally selected the wrong person, they can exit before saving the signature, or “Undo this sign-in” after saving the signature.
- The instructor can also remove incorrect signatures using the “Undo this sign-in” after the signature has been confirmed.
- Changes can be made until the class is set to **Complete**. The timestamp will always be from when the signature was actually captured.



Viewing signatures

- A “View signature” link appears in the Manage Attendees section after the person has signed the digital sign in sheet.
- The standard attachment viewer displays the signature as an image file with the person’s name and the date timestamp of the signature as the file name.
- Signatures may be viewed on completed classes but may not be changed or added.

The screenshot shows the ESO Personnel Management interface. The left sidebar contains navigation options: Personnel, Training, Group Actions, Settings, Apps, and Menu. The main content area displays a class titled "Hazmat Awareness and Operations" with a start date and time of 06/07/2021 at 09:00. Below the class information, there is a table of attendees. The table has columns for Name, Status, Reason (if applicable), Score, and a "Remove" button. The "View signature" link is highlighted in red for Jack Badden and Sheva Alomar.

Name	Status	Reason	Score	Remove
Cheeseman, Carter	No	Medical (excu...)	N/A	Remove
Burton, Moira A	Yes	Pass	0-100	Remove
BRADLEY, CONNOR	Yes	Fail	0-100	Remove
Baden, Jack	Yes	View signature	N/A	Remove
Alomar, Sheva	Yes	View signature	0-100	Remove

Action Items

- Add values to the Session Name list.
- Add values to the Absence Reason list, if using.
- Add a session to any open classes with no sessions.
- If needed, make changes to open classes with existing multiple sessions to put the correct attendees and credits on each session.
- If desired, make changes to completed classes with existing multiple sessions to put the correct attendees and credits on each session.
 - Note: Session dates on completed classes cannot be changed, but other session information may be modified if the user has the “Unlock Class” security permission. This permission is included by default in the PM Training Manager and Personnel Management Admin security roles. It may also be included in other security roles created by the agency.

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